Business Management Modernization Program (BMMP)

Investment Review Board Portal
User Manual for Components

Version 07 15 05

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I. Introduction

The Investment Review Board Portal is a secure web based platform that provides the ability for users to collaborate on projects, sharing documents, identifying and assigning tasks, and scheduling calendar events. The portal is accessible from any location using a web browser.

This manual is designed to assist users of the Business Management Modernization Program (BMMP) Community with accessing the portal, navigating, and performing specific functions related to the BMMP initiative.

II. Portal Terminology

The following terms are associated with the portal software and may be referenced in this document.

Portal	A secure web based platform that provides integration services, advanced search, collaboration, and content management in one location.
Portlets	Electronic services that deliver information.
Communities	Web sites within a Portal used to deliver applications and workspaces.
Subcommunities	Secure hierarchy that allows users to create communities within communities.
Project	The main unit of collaboration that lets users work together setting schedules, assigning tasks, sharing documents and exchanging ideas.

III. Investment Review Board Portal Access

I. The Component PCA must obtain access to the Investment Review Board portal. The Investment Review Board portal is the automated workflow tool and the OSD single entry point for electronic submission of certification packages and related communication. The Component PCA posts the submission package to the appropriate system folder located on this portal.

II. The Investment Review Board portal is located at https://portal.acq.osd.mil/portal/server.pt

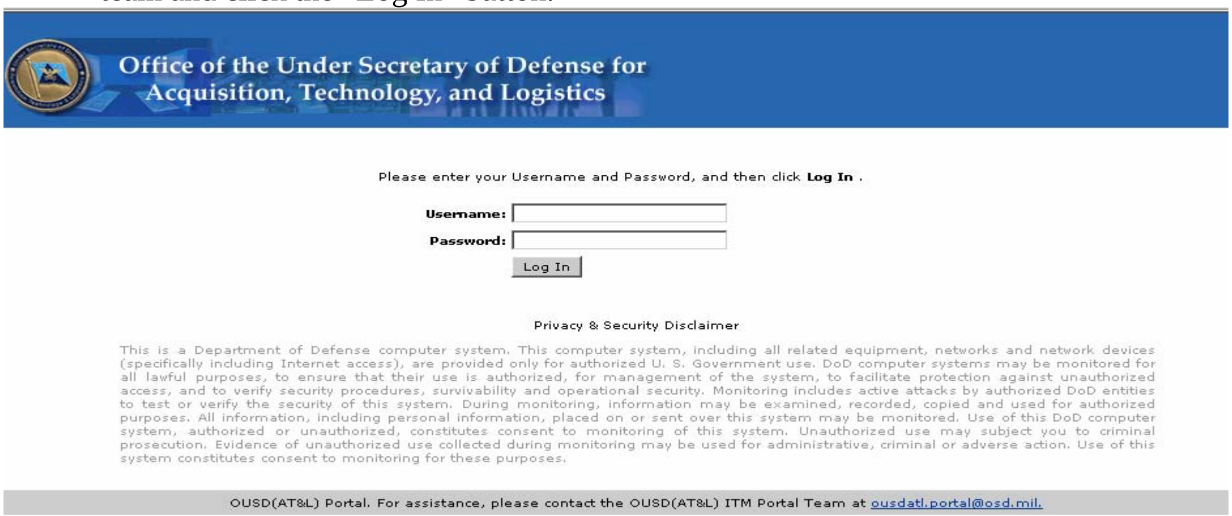
III. Access to the Investment Review Board portal is password restricted. Each IRB has a point of contact (POC). To establish a portal account and obtain login information, contact the POC for your IRB and identify name, organization, phone number, and email address on the External Account Request Spreadsheet.

   a. FM: Kathy Hammer, kathy.hammer@osd.mil
   b. WS&MSM: Walter Schneider, walter.schneider.ctr@osd.mil
   c. RPILM: Tracy DeBusk, tracy.debusk.ctr@osd.mil
   d. HRM: Jeanette Whiten, jeanette.whiten@osd.mil

IV. Login to the Portal

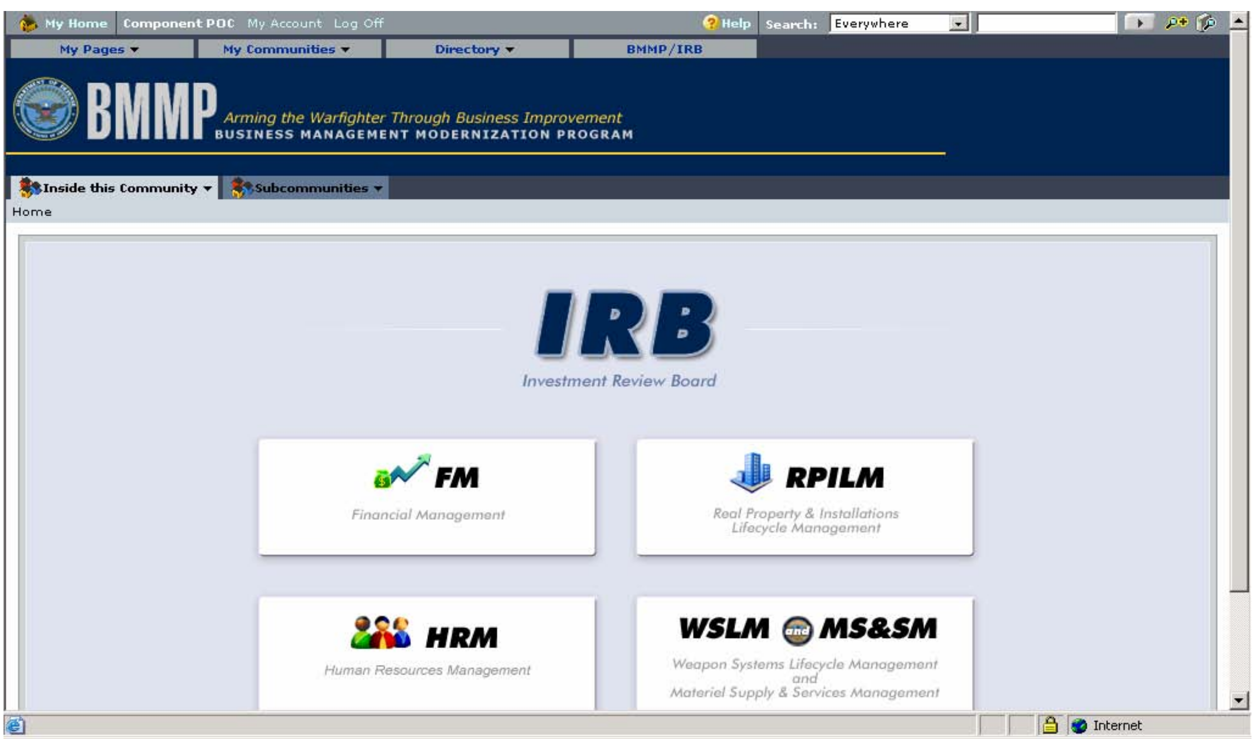
1. To login to the Investment Review Board Portal, go to an internet browser and type in the URL:https://portal.acq.osd.mil/

2. In the Login Screen, enter your username and password provided by the Portal Services team and click the “Log In” button.



(Figure 1)

Upon login, you will see the BMMP/IRB Community Page. On this page, each IRB is represented by a tab. Click on the tab to enter the workspace for the IRB.

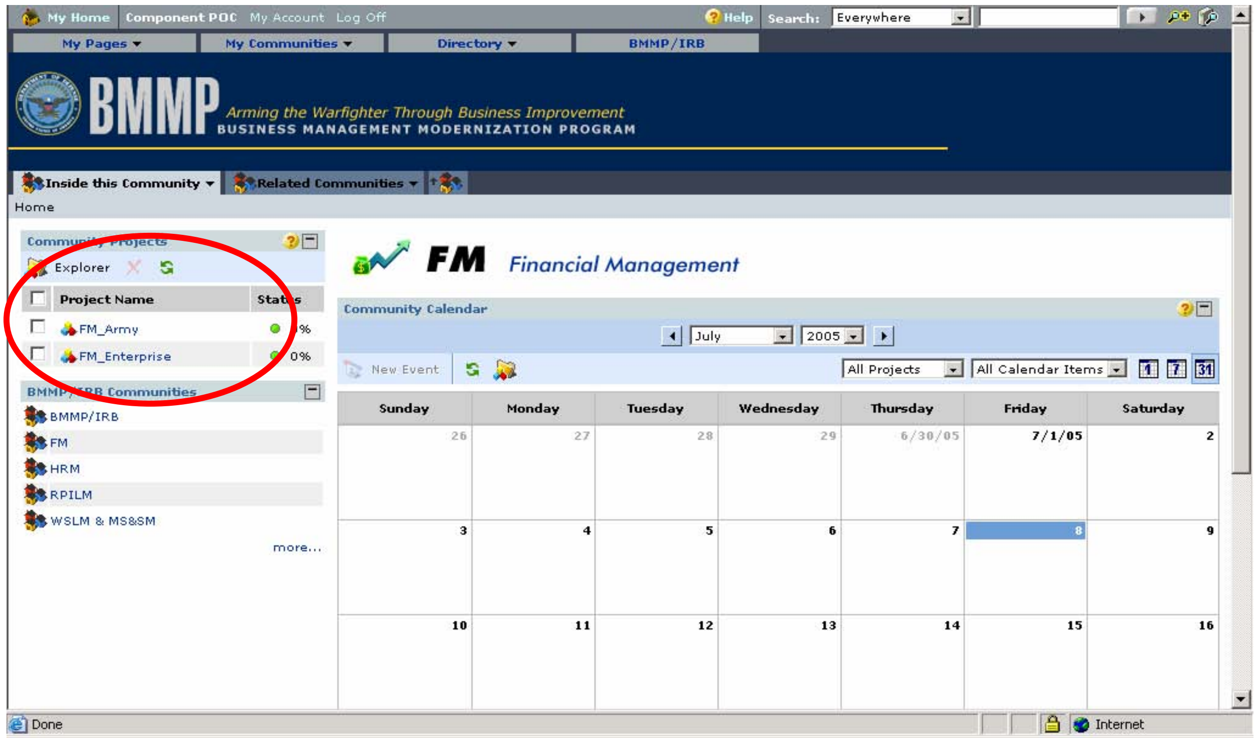


(Figure 2)

V. Uploading Documents

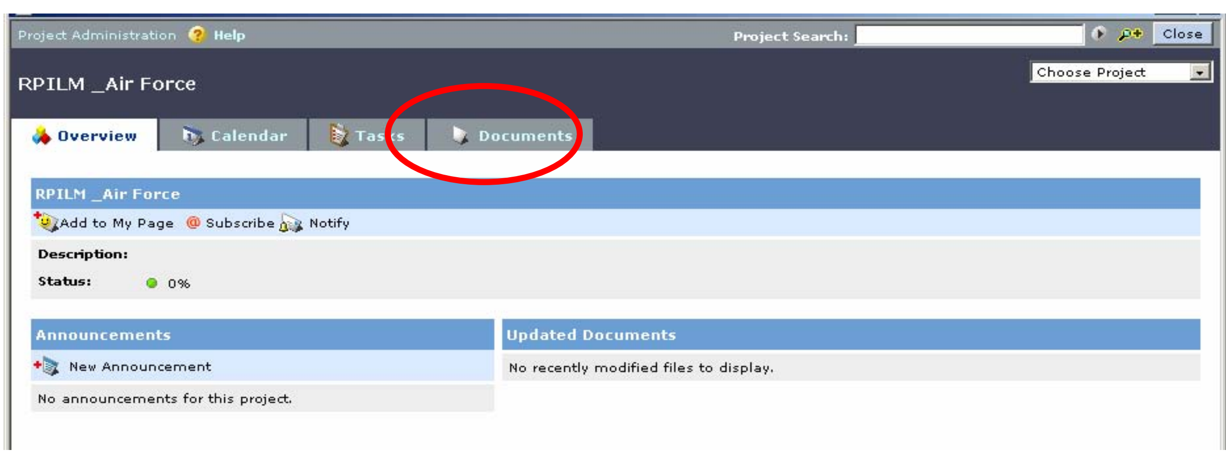
When uploading documents, please refer to the naming conventions specified in the [DOD Business Systems Investment Review Proposal Submission Guideline.](#)
To upload a document, follow the steps below from the IRB Sub community Page.

Step 1 - Locate your **Component** in the ***Community Projects*** Portlet and click the link.



(Figure 3)

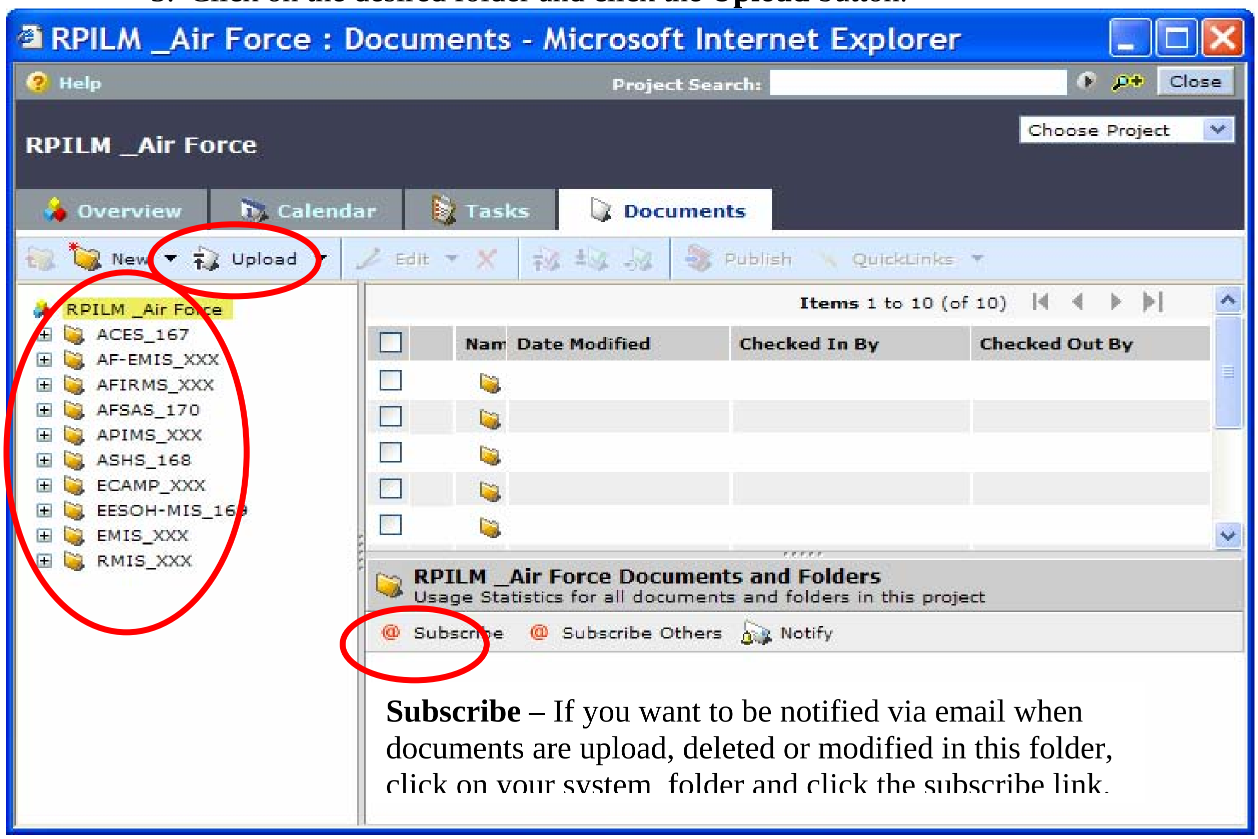
Step 2 – Clicking on the link will open an ***Overview Page*** that displays summary information; such as status and most recently updated documents. Click on the **Documents** tab located at the top of the page.



(Figure 4)

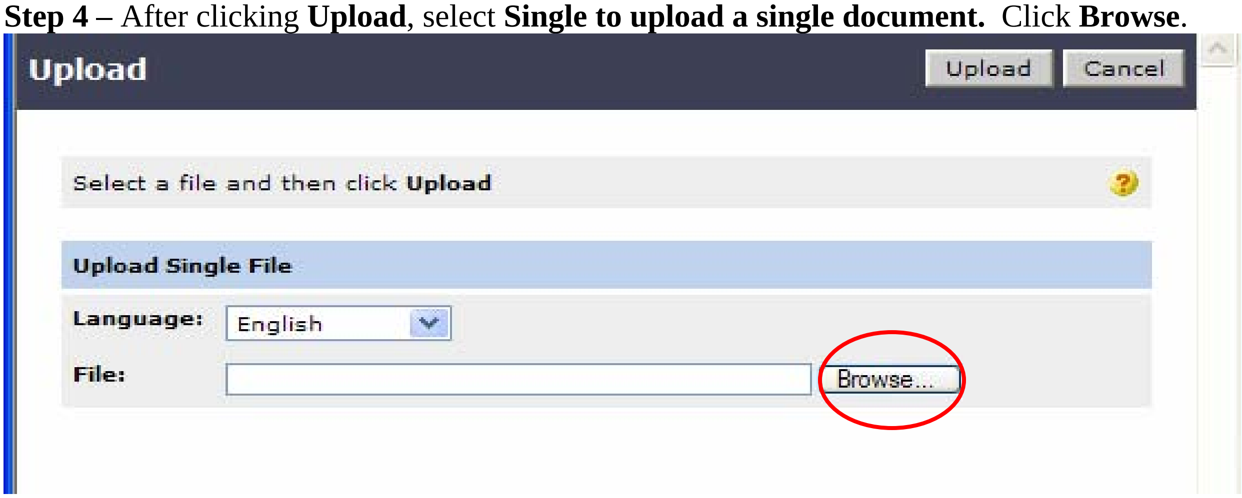
Step 3 – After clicking on the documents tab, you will see a folder structure on the left side of the page. Each folder represents a system name. The folder structure is:

1. System – the naming convention used for your specific system folder is based on the DCIO's designated unique business system registration identifier (hereafter referred to as SystemAcronym_ID# which is currently defined as SystemAcronym_DITPR# - Format example is SABRS_21)
2. Fiscal Year (format example: FY2006)
3. Click on the desired folder and click the **Upload** button.



(Figure 5)

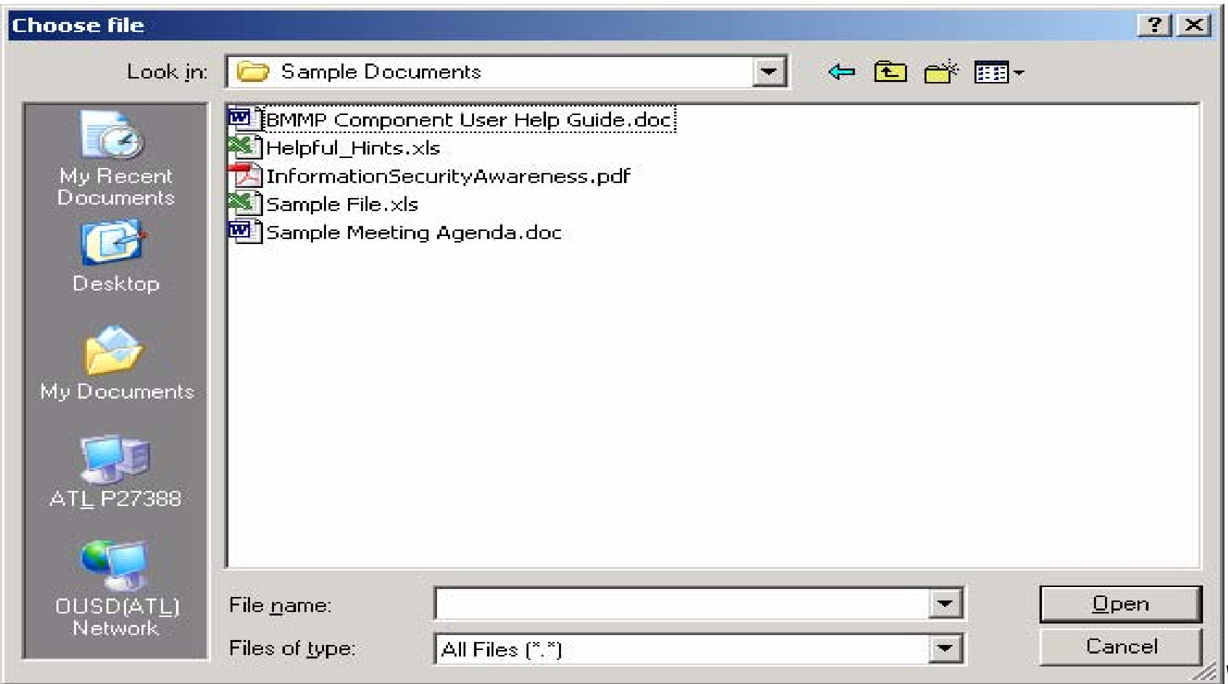
Step 4 – After clicking **Upload**, select **Single to upload a single document.** Click **Browse**.



(Figure 6)

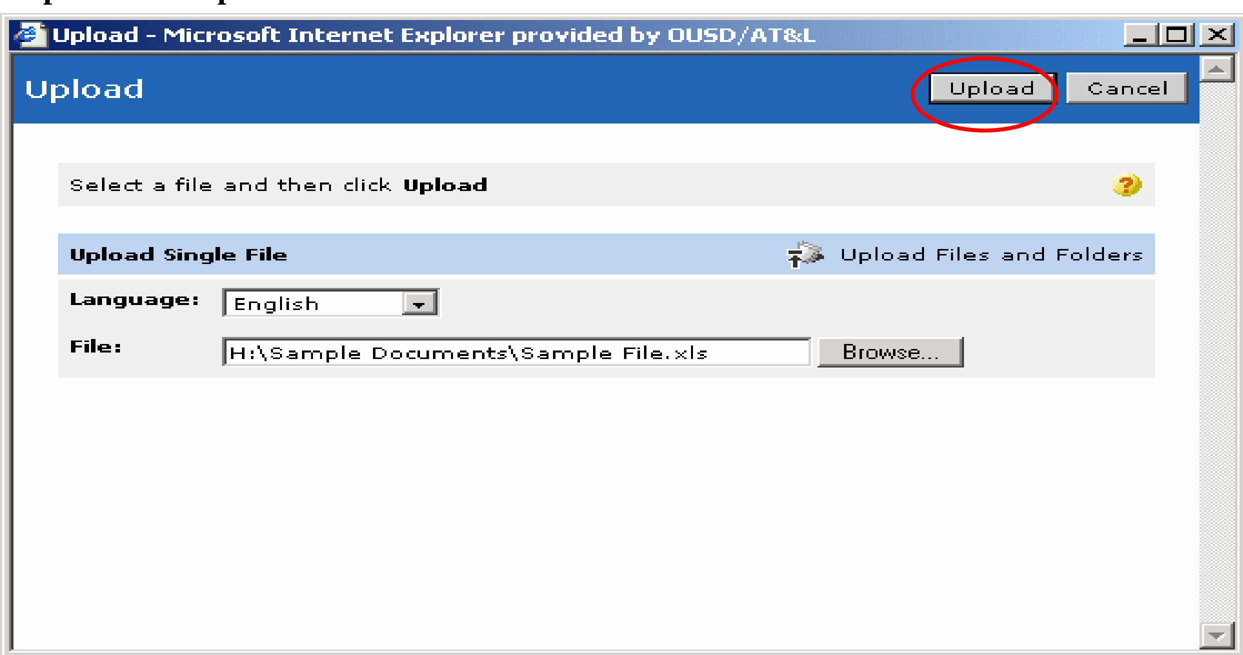
Step 5 - Navigate to the location of the file and select the file. Click **Open.**

Note: ***The size of your file must not exceed 50MB.***



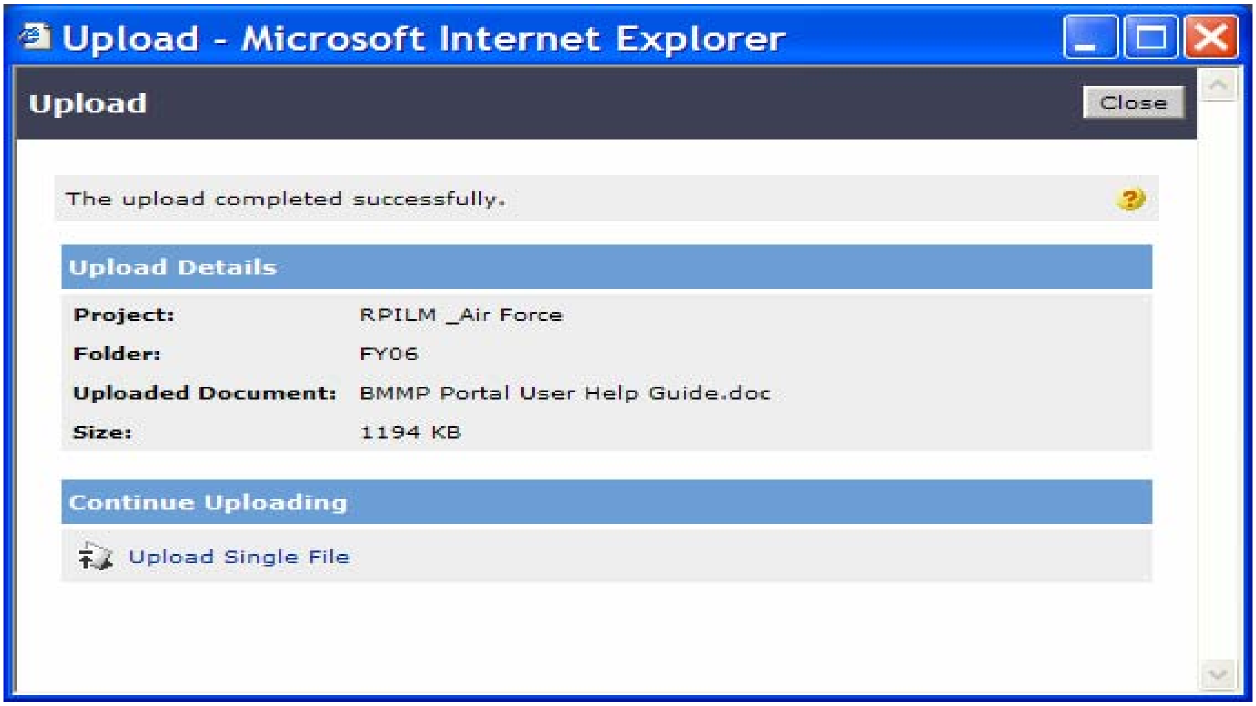
(Figure 7)

Step 6 – Click **Upload.**



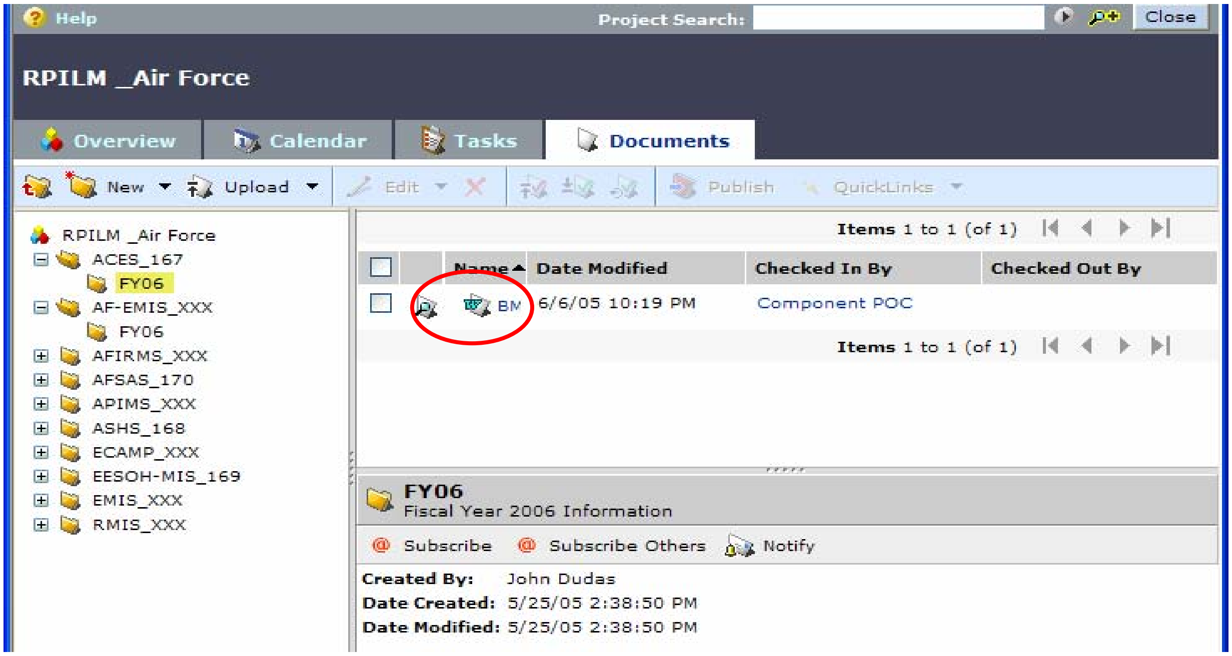
(Figure 8)

Step 7 – Once a document has been successfully uploaded, you will receive a confirmation screen with the details of the documents. Click the **Close** button at the top right side of the page to finish**.**



(Figure 9)

Step 8 – All uploaded documents will appear in the folder view. To access a document, click on the file name that acts as a link to the document.

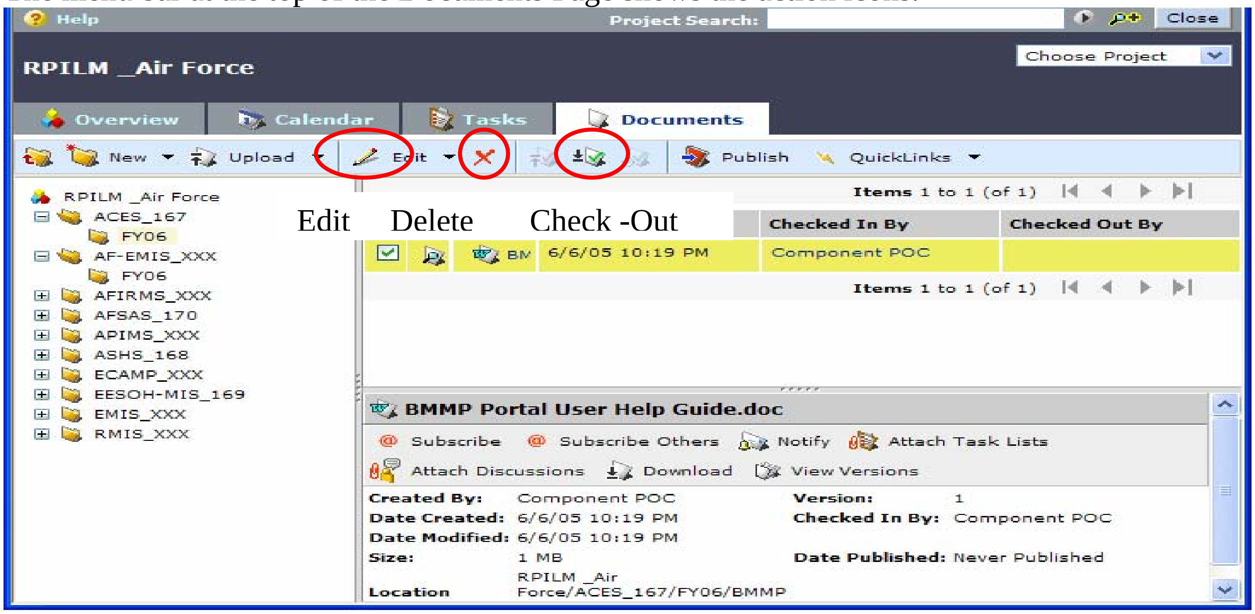


(Figure 10)

Step 9 – Click the **Close** button at the top right side of the page to finish**.**

VI. Other Document Functions

Below is a list of functions you can perform in the documents area in addition to uploading files. The menu bar at the top of the Documents Page shows the action icons.



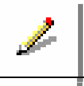
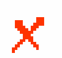
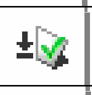
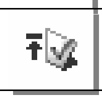
(Figure 11)

Function	Use
Upload	Select the desired folder. Click **Upload**, and then select **Single** to upload a single document. Click **Browse**, then navigate to the location of the file and select it. Click **Upload.**
Check-out a document	You can check-out the current version of a document & lock it for editing. Other users will still be able to view the file, but will not be able to make any changes to it, until you check the file back in. The system will keep copies of all versions of a document and a complete revision history. To check-out a document select the document then click the **Check-Out** icon and choose whether to **download the current version** of the document or **work from an existing version on your computer.** Click **Finish.** Users who view the file will see who has checked it out & the date and time it was checked out.
Check-in a document	To check-in a document, select the document (checked-out documents are highlighted by a red checkmark), click the **Check-In** icon, then browse to the file location and upload it.
Delete document	To delete a document from the portal, select it and click the **Delete** Icon.
Subscribe	To subscribe to a folder/document to receive email notification when changes are made, select the folder/document, and then click **Subscribe.**
Unsubscribe	To unsubscribe from a folder/document & stop receiving email notification when changes are made, select the folder/document, then click **Unsubscribe.**

Function	Use
Notify	Send an email notification to other project users to view the document. Click **Notify,** then click **To** & select the name of the project users to notify.
View Versions	View the version history of a particular document. All previous versions of a document are saved and you. Select the document, click **View Versions.**

VII. Document Icons

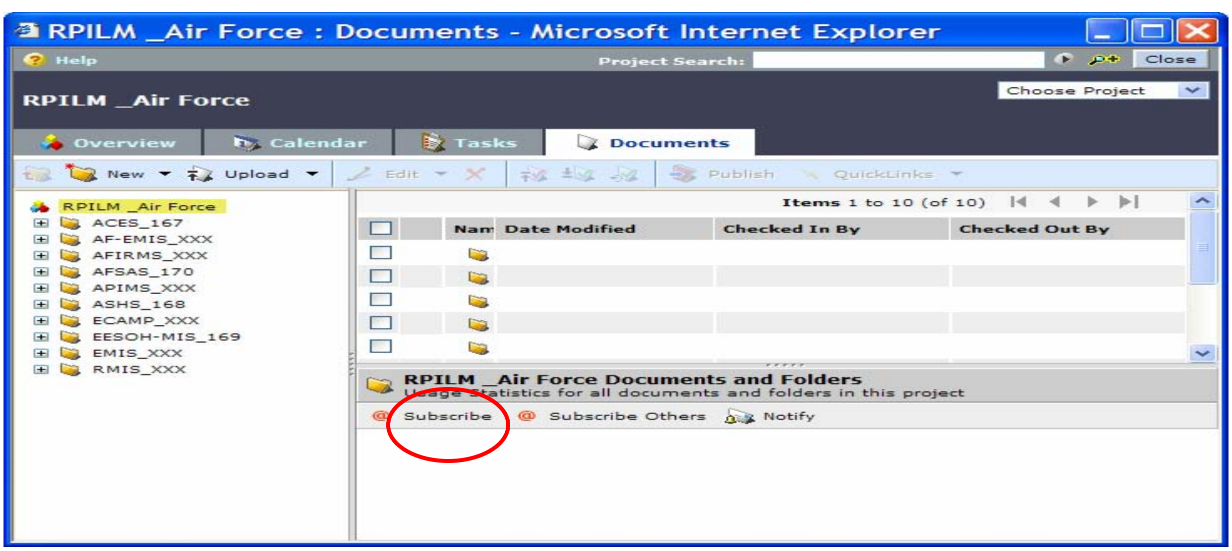
The following icons are available when viewing a document:

Icon	Use
	Edit the document properties
	Delete the document
	Check out the document
	Check in the document

VIII. Subscriptions/Notifications

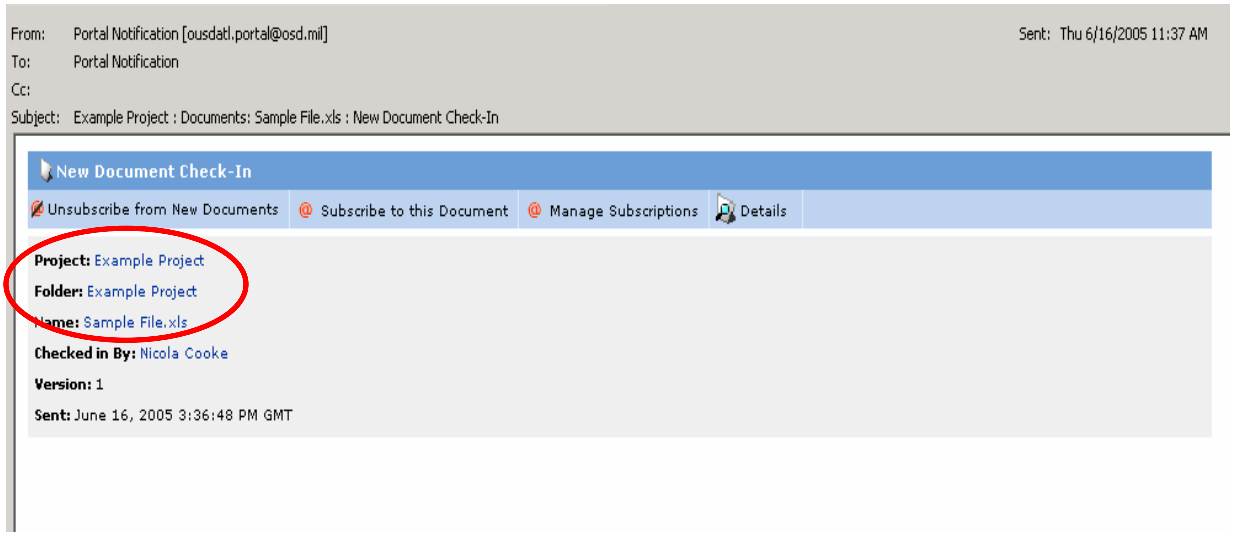
Portal users can subscribe to folders and documents in order to receive email notification when changes are made.

Step 1 - To subscribe to a folder/document, click the checkbox next to the folder/document name, and then click **Subscribe**. To unsubscribe from a folder/document and stop receiving email notifications when changes are made, click the checkbox next to the folder/document name, then click **Unsubscribe**.



(Figure 12)

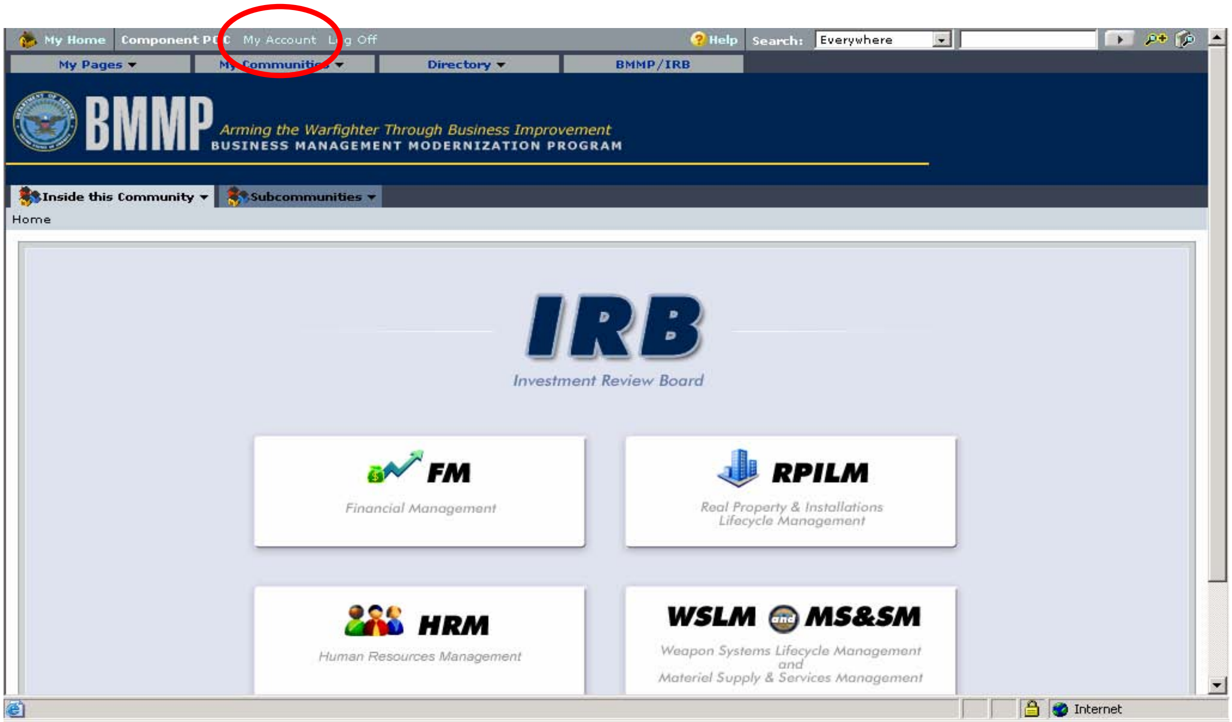
Step 2 - Users who have subscribed to a folder will receive an email notification when a new document is uploaded/checked in or deleted. Users who have subscribed to a document will receive an email notification when changes are made to the document. The email notification will contain links to the project, folder, and document.



(Figure 13)

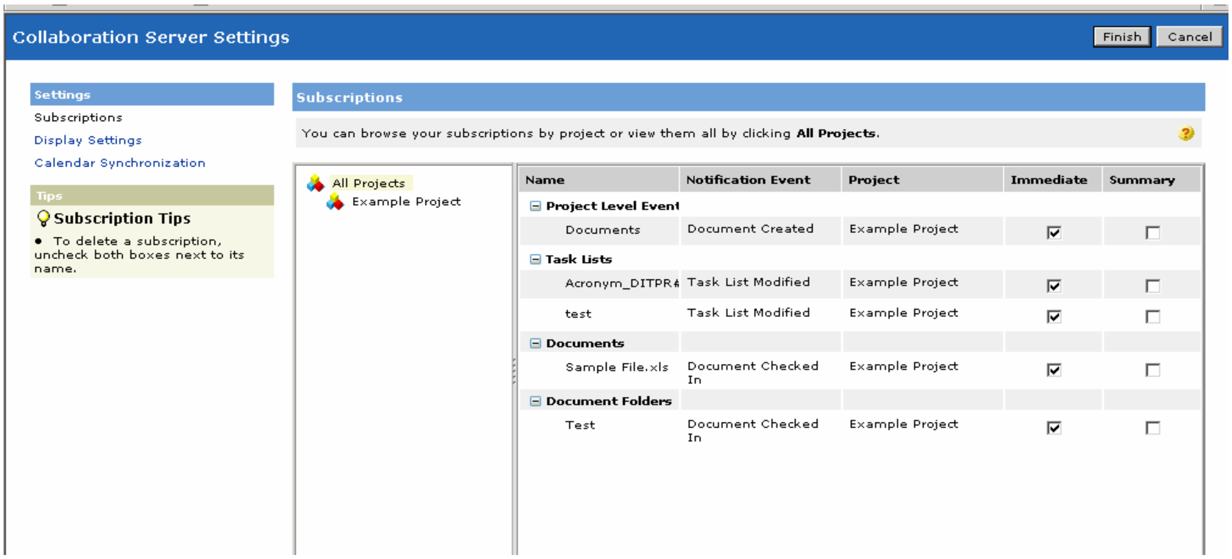
IX. Managing Your Subscriptions

Step 1 - To manage your subscriptions, click the My Account link.



(Figure 14)

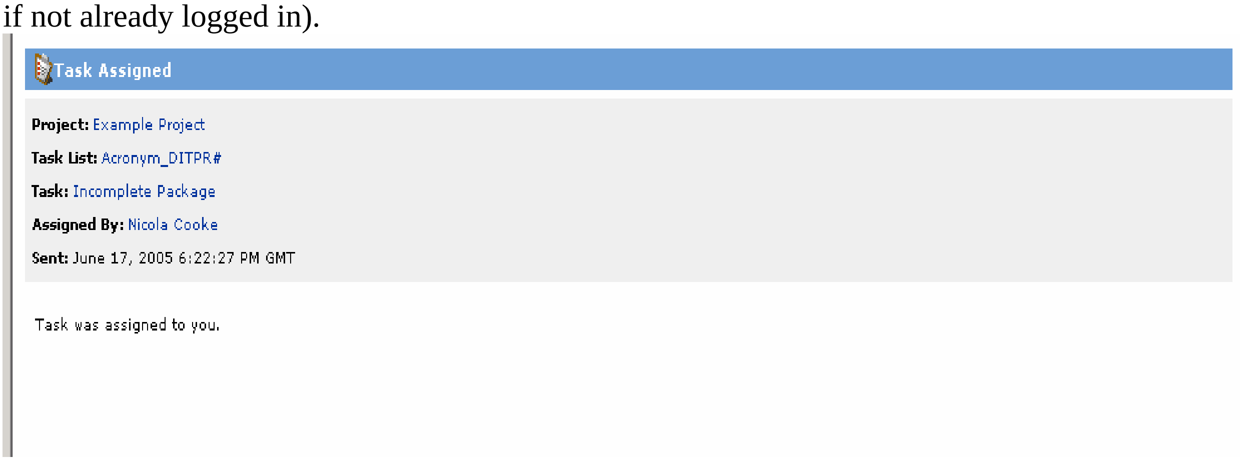
Step 2 - You can manage your subscriptions, deleting the ones you no longer want and specifying the types of e-mail notification you want for each subscription. You can choose to receive immediate notification, summary notification of all messages for the day or both types of notification. If you want to delete a subscription, you must clear all relevant check boxes.



(Figure 15)

X. Tasks

A task is a single unit of work to be completed by one or more persons. A task defines the work to be done, the person to do the work and the due date. If a certification package is incomplete a task will be created notifying the component POC of the missing items. An email notification will be sent to the assigned person/persons when a task is created. To view the details of the task and update the status, click the **Task** name link in the email (you may have to log into the portal if not already logged in).

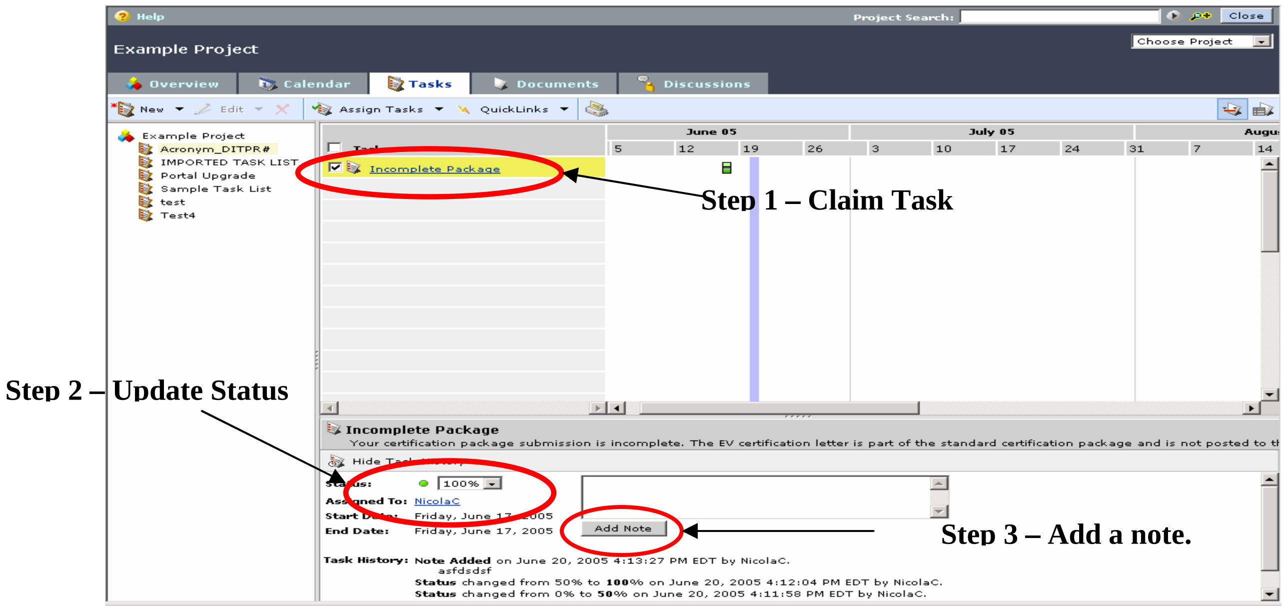


(Figure 16)

XI. Claiming and Completing a Task

Tasks can be assigned by IRB Leaders requesting addition information. Notifications will inform you that a task has been assigned to you. To claim a task, follow the steps below:

1. Click on the Task Link in the notification email that was sent. This link will take you directly to the assigned task (You may be required to login to the portal).
2. Right click on the Task and click the Claim Link.
3. When the task is complete, change the status to 100%, and add a note in the comments field for the leader who has assigned that task.



(Figure 17)

Function	**Use**
Update task status	To change the completion percentage and status of a task, select the desired percentage in the **Status** field.
Print	Displays a print preview of the task list. Click Print in the Print Task List page.
Add A Note	Enter the text in the text box and click **Add Note**

XII. Additional Support

For assistance with the Investment Review Board Portal, contact the AT&L Web/Portal Services Team at ousdATL.Portal@osd.mil or at 703-602-2598, option 5.